INTERCOMPANY SERVICES COORDINATION PLAN

PROJECT PLANNING AND COORDINATION

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1. GENERAL

1.01 This section describes procedures that may be necessary for the planning and scheduling of Intercompany Services Coordination (ISC) requiring special or close coordination. It also describes the appointment of Project Teams and their responsibilities and the preparation of Project Schedules.

1.02 This section has been revised and replaces Issue 3. Since this is a general revision, arrows ordinarily used to indicate changes have been omitted.

1.03 To achieve the Bell System goal of providing customer services as ordered in a timely and efficient manner, good planning, organizating and control of all phases of Universal Service Orders (USOs) and Service Inquiries (SI) are required.

1.04 Procedures for the planning, implementation and for major changes of a Switched Service Network (SSN) are covered in the "Switched Services Plan for Coordination" or the "Tandem Tie Trunk Network Coordination Plan" and provide for control and tracking of a project by an SSN Customer Relations Team and an SSN Project Team. USOs will be processed in the same manner as that specified under ISC procedures; however, the SSM Project Team will act as the Control Team for the network involved.

2. PLANNING AND SCHEDULING

2.01 Planning and scheduling are commonly thought of as a single operation. However, while they are interrelated phases of an overall job, they are properly defined as separate and distinct functions, where in planning is an essential requisite to scheduling.

2.02 Planning is the process of identifying those tasks which must be performed in proper sequence to successfully reach an objective. This planning phase necessitates the breaking down or analysis of all tasks to a level of detail which allows identification of skills, knowledge, job aids and other requirements that are likely to have a significant influence upon reaching the objective. Further, the planning phase should clearly identify the interrelationships and interdependencies which exist between the various tasks.

2.03 Scheduling can commence once all the significant tasks have been identified. The scheduling phase involves the assignment of responsibility for the various tasks, the determination of time required for their execution and the preparation of an overall schedule which identifies certain critical dates in the schedule and culminates with the Due Date (DD). The schedule should depict contingencies showing tasks which are to be accomplished in parallel as well as those that are dependent and occur sequentially.

2.04 The ISC services, regardless of complexity or requested DDs, require adequate planning and scheduling consideration. Routine services generally have the actual details prearranged, and thus may only require close attention to the USO preparation to ensure that all information is accurate and complete. The ISC Interval Guide provides the basis for scheduling all services and is the primary tool used for this process.

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2.05 Upon completion of the scheduling effort, it will be more apparent which tasks require extra effort and where the effort can be used to the fullest advantage. Because of this process, it is now possible to objectively and accurately identify tasks that can be shortened, performed in parallel with other tasks, or must be worked sequentially, and even some that can be eliminated. Thus, it is much easier to forecast and justify the need for extra work effort and to determine where it can be used to the best advantage. Further, it is through this type of effort that realistic commitments are made to customers and fulfilled without undue penalty or crisis.

2.06 Services other than those with standard intervals are to be handled on an Individual Case Basis (ICB) and always require close attention to the planning and scheduling functions. Sales should consult with the appropriate interval contact(s) listed in the ISC Directory and the other control team members before establishing firm order due dates. It is the responsibility of the Control ISC Team to carry out the planning to establish a realistic schedule culminating in a DD which is acceptable to the customer.

3. PROJECT TEAMS

3.01 The appointment of project teams should be considered for the complex and/or network of services as well as other services when the magnitude of the job merits this type of handling. The requisite to the appointment of such a team should be a requirement for detailed planning and scheduling followed by close review and coordination during the implementation phase of order processing.

3.02 Project teams are appointed for specific undertakings. They are: (1) major additions or changes to telephone plant, eg, PBX, CENTREX®, etc., and (2) complex and/or network of services negotiated or offered to customers. This section is concerned with the latter. However, project team activities could involve both of the above undertakings under the auspices of one project team.

3.03 The responsibility for the establishment of a project team rests with the Control ISC Team. Any team member (control or local control) may recommend the establishment of such a project team in consultation with control team members. However, the final decision is the responsibility of the Control Team Chairman.

3.04 Project teams are established for specific undertakings and their scope and term of appointment should be clearly delineated. They are charged with the same responsibilities as the Control ISC Team and act as their representatives during the project effort. Members of the Control ISC Team are responsible for ensuring that their representatives on the project team are aware of and follow through on departmental ISC responsibilities. Therefore, it is advisable to require status reports at critical check points during the term of the project from the project team, which will aid in keeping the Control ISC Team informed as to the progress and status of the project. Further, ISC control and local control team members may also be project team members.

3.05 When a project team has been established, all involved USOs are to include an assigned project number. Project numbers are assigned by the Western Electric (WE) Service Center coordinating the project and appear in the RMKS section of the USO. The third segment of the order number as listed in the ISC Directory will identify the WE location having the appropriate responsibilities as noted in Section 010-520-139.

3.06 The WE Project Team member has the responsibility for determining which WE location will coordinate the project supply effort. In addition, this member has the responsibility for obtaining a project number assignment.

3.07 The sales representative will normally be the chairman of the project team. However, this responsibility may be assigned to another departmental representative by the Control ISC Team when deemed appropriate.

3.08 Project teams may be created at any time, normally prior to the Application Date. It is particularly advisable to appoint a project team as early as possible, rather than as a stop gap measure when a crisis has arisen.

3.09 The basic responsibilities of the project team include:

(a) Detailed planning.

(b) Development of project schedules.

(c) Exercise of sufficient controls to ensure that implementation proceeds according to plan and schedule.

3.10 The project team should receive all jeopardy reports. The team will solicit and enlist the assistance of other team members (control and local control) and higher management, when necessary, to clear unresolved jeopardy conditions.

3.11 The departmental responsibilities to be assumed by each project team representative are covered in the specific sections of the ISC Plan covering departmental responsibilities. The following paragraphs provide a brief overview of some of the more critical project team member responsibilities which may not be covered in specific sections.

3.12 The marketing representative will normally chair the project team and in this capacity will:

(a) Provide leadership to ensure that the implementation phase of the project is adequately administered to meet the customer commitment.

(b) Determine through consultation with other departments, the interdepartmental project team membership.

(c) Issue interdepartmental project announcement to all involved ISC Teams and others as appropriate. ***Note:*** This announcement is in addition to the Western Electric project announcement.

(d) Ensure that all team members fully understand their project responsibilities.

(e) Conduct a formal meeting (or formal telephone conference) of team members to determine project schedules, critical dates and Operating Telephone Company (OTC) participation. Prior to this meeting all departments should be advised of the basic requirements of the service.

(f) Schedule subsequent team meetings or conference calls.

(g) Establish a positive reporting system among all team members to accurately reflect current status.

(h) Publish results and schedules.

(i) Call upon any or all team members to assist in the preparation of the USO.

3.13 The Engineering (or Design) Project Team member is responsible for the coordination or administration of facility and equipment assignments, circuit layout records, ordering or requisitioning of station equipment. Records Issue Date is a positive reporting date but other critical dates such as PRD, EIRD, etc, may require reporting for project team purposes.

3.14 The engineering design representative has a prime responsibility for ensuring that the customer's service requirements are translated into an effective communications system. This may necessitate consultation with the customer, the sales team representative and other team members prior to the issuance or during the processing of the USO. Upon completion of this effort, any or all of the project team members may be called upon to assist sales in the preparation of the USO.

3.15 The plant project team member is responsible for the overall coordination of plant's effort required to complete a USO. This includes installation, testing and reporting activities as specified on the order and CLRs. The plant team member will:

(a) In consultation with other team members, assist in the planning and scheduling phases of the service offering.

(b) Arrange for the procurement and provision of applicable plant training material and special instructions which may be required.

(c) Consult with the Engineering member and advise all involved plant locations of any ***special*** requirements for maintenance spare or test equipment needed for the service.

(d) Keep the engineering team member apprised of any difficulties in the delivery of supplies and/or equipment.

3.16 When a plant network manager is assigned, it is recommended that the manager also serves as the plant project team member.

3.17 The Business Services representative of the project team will review the details of

the proposed service with sales and the customer, and assist the other team representatives in preparing a USO. In addition, this team member will:

(a) Notify all Local Control ISC Team members of any customer training requirements.

(b) Review the service from the viewpoint of traffic volumes, and ensure that these needs are considered in the planning phase.

3.18 The WE representative of the project team will assist the team in planning and scheduling the service, and coordinate the supply of WE furnished material and will:

(a) Determine the supply intervals for the required material and assist in selecting Requisition Due Dates (RDDs) and Material on Job (MOJ) dates.

(b) Determine which WE Service or Regional Center will coordinate the supply effort.

(c) Issue Project Announcements to the Local Control ISC Team WE members.

(d) In cases of supply jeopardy conditions, negotiate improved schedules with the supply source, and/or attempt to obtain the required material from other service centers or alternative sources.

4. PROJECT SCHEDULES

4.01 The project team should develop a comprehensive project schedule, and ensure adherence to it. Each schedule should be tailored to satisfy the implementation of the specific service to the satisfaction of the customer.

4.02 Copies of the project schedule should be sent to all ISC Teams involved. Samples of typical project schedules that might be developed are shown in Fig. 1 and 2. The items involved will, of course, vary between projects.

4.03 The project schedule will show the assignment of items as the responsibility of specific departments. These items will include all vital aspects of the project. Columns for posting the objective, as well as actual, start, and completion dates should be shown on the schedule.

4.04 Administrative tools, commonly referred to as critical path methods, such as the Programmed Evaluation and Review Technique (PERT) may be used for the planning and scheduling of work. Figure 3 shows a typical PERT plan and schedule drawn in summary form. Any part of this could be expanded, as needed, into more detail.

4.05 All dates established during the planning and scheduling phases of any project should be followed up to ensure that the implementation phase is progressing satisfactorily. For this reason progress reports, as defined in the section on "System Status Reports", may be requested by the Control ISC Team or by the appointed project team.

4.06 The Interdepartmental Project Announcement, typically will contain:

(a) List of project team members

(b) The assigned project number

(c) Overall project schedule

(d) Unusual conditions

(e) Other items as appropriate.

ITEM NO.	DESCRIPTION	DEPT RESP	WEEK BEGINING 24 MAR.	23 APR.	22 MAY	15 JUNE	21 JUNE	26 JUNE	20 JULY	19 AUG.	30 AUG.
1	Develop Equipment Requirements	M,E,BS	X								
2	Issue Interdepartmental Project Announcement	M	X								
3	Issue USO(s) Service Inquiry(ies)	M,E	X								
4	Conference Call - Discuss Inq. Replies	M,E		X							
5	Issue USO(s) or Service Inquiry(ies) Covering Other Locations, etc.	M,E	X								
6	Evaluate Inq. Replies- Establish Required Intervals	Team		X							
7	Proposal - Establish Acceptable Due Date to Custmomer	M			X						
8	If Required, Renegotiate Customer Due Date (6)	M			X						
9	Prepare USO(s)	M,Team			X						
10	Issue USO(s)	M			X						
11	Issue WE Project Announcement	W			X						
12	Issue Local USO Orders	BO			X						
13	Issue Engineering Information Reports	E				X					
14	Issue Requisitions RRD	E,W					X				
15	Issue Circuit Layout Records RID	E						X			
16	Check DVA Completion	P							X		
17	Plant Testing (PTD)	P								X	
18	Issue Training Data	BS				X					
19	Complete Customer Training	BS									X
20	USO(s) - Progress Reports	E,P,BS			XM			XE	XBS XP		
21	Due Date-Completion Report	—P									X

X = Objective Completion Date

Fig. 1—Typical Project Schedule

PROJECT					
	DUE DATES		ACTUAL DATES		DEPT RESP
	START	COMPL	START	COMPL	
1. Issue Interdepartmental Project Announcement	---	---	---	---	---
2. Initiate Service Inquiry —response followed by conference call (when required) to discuss response to Service Inquiry.	---	---	---	---	---
3. Prepare minutes of conference call and distribute to all concerned.	---	---	---	---	---
4. Service Inquiry to other locations to determine service and equipment availability (Intercompany)	---	---	---	---	---
5. Evaluate responses to Service Inquiry — establish required intervals.	---	---	---	---	---
6. Investigate general trade supplies, when appropriate (availability, price, etc), and WE supply conditions.	---	---	---	---	---
7. Proposal — establish acceptable Due Date with customer.	---	---	---	---	---
8. If customer Due Date (6) cannot agree with (4) — renegotiate.	---	---	---	---	---
9. Interdepartmental meeting to establish:	---	---	---	---	---
a. Material availability interval and delivery date.					
b. Facility availability and test schedule.					
c. Interval required to prepare and distribute engineering information.					
d. Installation interval at all locations and time table.					
e. Requirements of and time table for general trade suppliers (forms, equipment, etc).					
f. Operating procedures and training timetable.					

Fig. 2—Typical Project Schedule (Sheet 1 of 3)

PROJECT					
	DUE DATES		ACTUAL DATES		DEPT RESP
	START	COMPL	START	COMPL	
10. Issue USOs, including special instructions billing, training etc.	---	---	---	---	---
11. Business Services meet with customer to develop step-by-step operating procedure (customer product) and to define system training requirements (space and personnel) and time table.	---	---	---	---	---
12. Submit overall project time table to all departments involved.	---	---	---	---	---
13. Engineering specifications drawn and distributed.	---	---	---	---	---
14. Equipment pretested (Supplier).	---	---	---	---	---
15. Supplier's equipment delivered and installed.	---	---	---	---	---
16. Circuit installation and testing (including Plant end-to-end transmission test).	---	---	---	---	---
17. Completion and delivery of operating instructions.	---	---	---	---	---
18. Creation of sample raw data (such as master tapes and/or forms) where required by Sales and Business Services.	---	---	---	---	---
19. Equipment and operational procedures test conducted by Sales and Business Services, using raw data in (18) simulating actual proposed operation and evaluate results.	---	---	---	---	---
20. End-to-end system test conducted by Sales, Plant, and Business Services, simulating actual operation and evaluate accuracy and overall results.	---	---	---	---	---

Fig. 2—Typical Project Schedule (Sheet 2 of 3)

PROJECT					
	DUE DATES		ACTUAL DATES		DEPT RESP
	START	COMPL	START	COMPL	
21. Training of customer personnel.	___	___	___	___	___
22. End-to-end system test conducted by customer personnel (supervised by Business Services).	___	___	___	___	___
23. Cutover of initial locations (first phase) including customer operation of entire system.	___	___	___	___	___
24. Completion Report.	___	___	___	___	___

The above dates were agreed upon at an interdepartmental coordination meeting held on _____

In attendance:

_____ Marketing Department

_____ Engineering Department

_____ Plant Department

_____ Business Services Department

_____ WE

_____ Other

Fig. 2—Typical Project Schedule (Sheet 3 of 3)

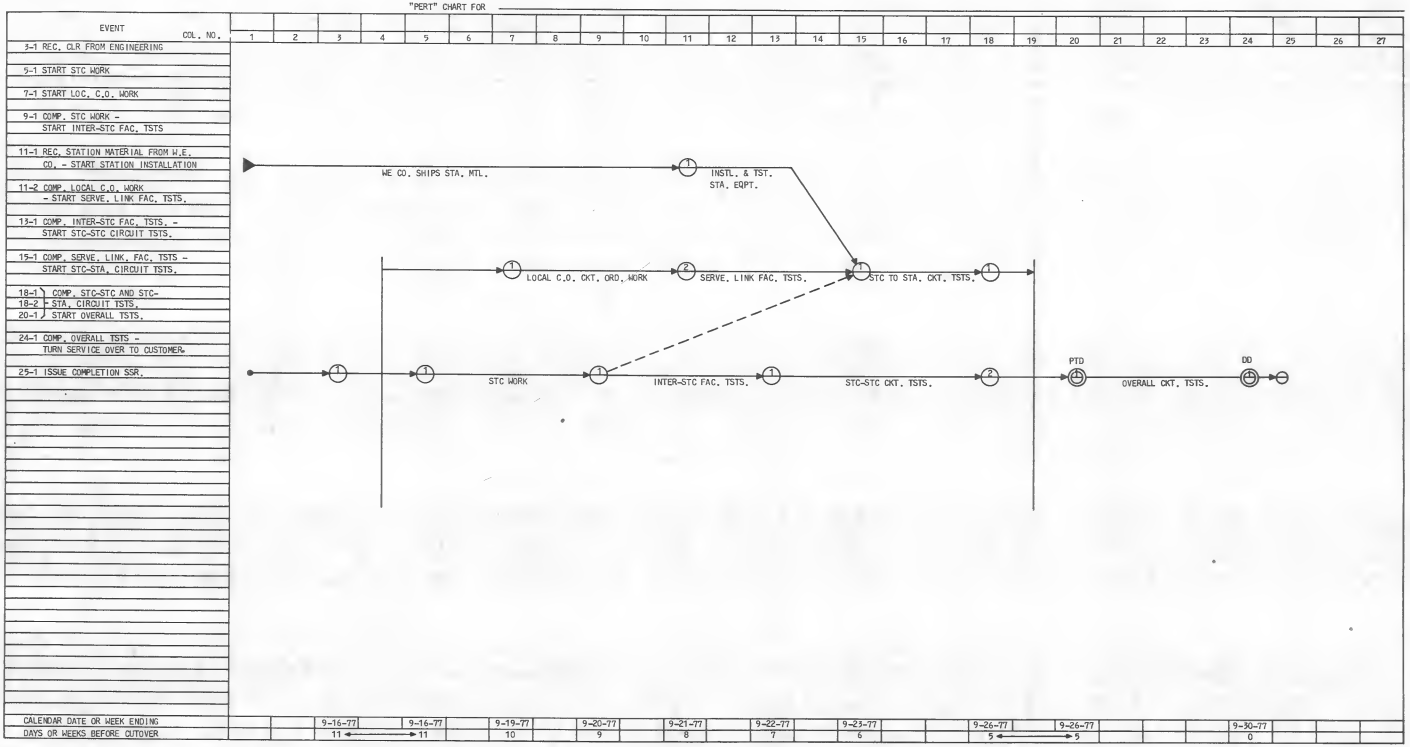
"PERT" CHART FOR
EVENT
COL. NO.
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27
5-1 REC. CLR FROM ENGINEERING
9-1 START STC WORK
7-1 START LOC. C.O. WORK
9-1 COMP. STC WORK - START INTER-STC FAC. TSTS
11-1 REC. STATION MATERIAL FROM W.E. CO. - START STATION INSTALLATION
11-2 COMP. LOCAL C.O. WORK - START SERVE. LINK FAC. TSTS.
13-1 COMP. INTER-STC FAC. TSTS. - START STC-STC CIRCUIT TSTS.
15-1 COMP. SERVE. LINK. FAC. TSTS - START STC-STA. CIRCUIT TSTS.
18-1 COMP. STC-STC AND STC-
18-2 STA. CIRCUIT TSTS.
20-1 START OVERALL TSTS.
24-1 COMP. OVERALL TSTS - TURN SERVICE OVER TO CUSTOMER.
25-1 ISSUE COMPLETION SSR.
WE CO. SHIPS STA. MTL.
INSTL. & TST. STA. EQPT.
LOCAL C.O. CKT. ORD. WORK
SERVE. LINK FAC. TSTS.
STC TO STA. CKT. TSTS.
STC WORK
INTER-STC FAC. TSTS.
STC-STC CKT. TSTS.
PTD
OVERALL CKT. TSTS.
DD
CALENDAR DATE OR WEEK ENDING
DAYS OR WEEKS BEFORE CUTOVER
9-16-77 9-16-77 9-19-77 9-20-77 9-21-77 9-22-77 9-23-77 9-26-77 9-26-77 9-30-77
11 11 10 9 8 7 6 5 5 0

Fig. 3—PERT Schedule